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Subject: FW: Eligible services for erate libraries/chaptes/administration ofnetwork
Date: Mon, 15 Jul 2002 13:43:19 -0600

-----Original Message-----
From: nabir@msn.com [mailto:nabir@msn.com]
Sent: Monday, July 15, 2002 1:36 PM
To: dave@onsatnet.com
Subject: Eligible services for erate libraries/chaptes/administration ofnetwork

Dear Mr. Stephens:

Per our recent conversation about libraries and chapters house eligibility under e-rate guidelines the following two articles copied from the SLD website review both the rules for eligibility and an alternative method of utilizing the chapters not only as libraries but as administrative offices to allow for branch library access and the ability to interface with the main library and the library services offered through other eligible entities including schools, and groups like headstart classrooms located within school buildings.

Under the first section "Administrative Offices..." the outline provides for the rational to consider specific entities as eligible and provides examples of similar situations already approved for eligible services.

The other section included below is the overview of how to set-up and what a Library Consortium consists of. The information in here is important to consider if the buildings are to be called libraries or if they are combination library and admin buildings serving multiple purposes and eligible for specific sets of

services depending on their "status".

My review of these documents advises that we coordinate three sets of applications

1. Application for services directly to chapters as Administrative Building(s) (for overall network connectivity and services) These could also include chapters telephone use when they do not have a physical phone connection through the Navajo Comm.
2. Application for services directly to chapters as library branch facilities with library information data interface services for both the physical coordination and delivery of library materials as well as access to centralized online library based content.
3. Application for SUPER-POP concept where if we calculate 110 chapters. We utilize a ratio of 10 to 1 and create or enhance 10 locations with advanced connectivity, advanced uplink capabilities, telecommunication services, "burstable" broadband, and prepaid internet DVB time.

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Administrative Offices and Buildings Fact Sheet
http://www.sl.universalservice.org/reference/AOBFactShee

Services to administrative offices and buildings are eligible for discounts under certain circumstances consistent with educational purposes. This Fact Sheet explains those circumstances.

1. **SLD Educational Purpose Policy Statement**
2. **Services to Administrative Offices**
3. **Services to Administrative Buildings**

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1. SLD Educational Purpose Policy Statement

The following Educational Purpose policy statement was adopted by the Schools and Libraries Corporation Board of Directors on November 20, 1997:

"The primary purpose of the services for which support is sought must be the delivery of services into classrooms or other places of instruction at schools and libraries that meet the statutory definition of an eligible institution. Support for the administrative functions of library or education programs is permitted so long as the services are part of the network of shared services for learning. Universal service support will be limited to services delivered to the onsite educational facility or facilities. Services at a personal residence or at locations that do not host places of instruction or are not accessible to library patrons, with the exception of a centralized district office or similar facility, are not eligible for support."

2. Services to Administrative Offices

Within Schools: Telecommunications Services, Internet Access, and Internal Connections for administrative offices in a school building are eligible for discounts only if the same services are also delivered to classrooms and other places of instruction in that building. The only exception is basic local and long distance telephone service, which is eligible for discounts even if the service is delivered only to an administrative office of the school building.

Example: If your school local area network is designed to include classrooms plus the principal's office, the nurse's office, and the teachers' lounge, the network installation as a whole would be eligible for discounts as Internal Connections. But if the same network did not include classrooms, it would not be eligible for discounts. If your school were applying for basic local and long distance telephone service only, however, services to the administrative offices would be eligible even if no classrooms were served.

Within Library Buildings: Telecommunications Services, Internet Access, and Internal Connections for administrative offices within a publicly accessible library are eligible for discounts only if the same

services are also delivered to the publicly accessible rooms in that building as well. The only exception is basic local and long distance telephone service, which is eligible for discounts even if the service is delivered only to an administrative office of the library building.

Example: If your library's contract with an Internet Service Provider covers access from anywhere in the building, including the head librarian's office, then the head librarian's Internet access would be eligible for discounts. If Internet access is for the head librarian only, however, it would not be eligible for discounts. At the same time, if your library was applying for basic local and long distance telephone service) only, services to the administrative offices would be eligible even if no areas accessible to library patrons were served.

3. Services to Administrative Buildings

Definition of Administrative Buildings: Buildings operated by a school or school system that do not house classrooms, and buildings operated by a library or library system that are not accessible to library patrons, are defined as administrative buildings.

Telecommunications Services and Internet Access: Two-Part Test for Eligibility of Services to Administrative Buildings: Use the following test to determine whether Telecommunications Services or Internet Access for your administrative building(s) are eligible for discounts.

1.   Is the building a centralized district office or similar facility?
2.   Are the telecommunications and/or Internet services being provided to the administrative building as part of a network whose primary function is the delivery of such services to places of instruction in instructional buildings or rooms available to the public in libraries?

*   If the answer to both is yes, then the services are eligible for discounts.
*   If the answer to either is no, then such services are not eligible.

Example: Suppose your library system office, where the chief librarian and his or her staff is located, is also the hub of the telephone system that reaches each branch library building. The entire telecommunications system, including the services to the administrative building, would be eligible for discounts.

Example: Suppose your entire school district is covered by one Internet service contract providing access for all users, be they students in classrooms or staff in the central office where there are no classrooms. This entire contract would be eligible for Universal Service discounts as Internet Access.

Internal Connections: Internal connections in an administrative building are eligible only if the connections are essential for the effective transport of data and information within an instructional building. In particular, routers, hubs and servers located in an administrative building are eligible only if the building is the host for Local Area Networks (LANs) that serve instructional buildings. Connecting rooms within an administrative building by Ethernet or other means is not eligible.

Example: Suppose your school or library consists of several buildings, including an administrative building, on one campus not crossed by a public right of way. A network that connects all of these buildings on your campus would be considered a LAN; if the head-end of that network, including the server, hub, and router, were housed in the administrative building, then that server, hub, and router would be eligible for discounts.

Caution: In almost every instance, internal connections connecting administrative buildings with instructional buildings that are NOT on the same campus constitute a Wide Area Network. Please refer both to the, **Wide Area Network (WAN) Fact Sheet** and the **Eligible Services List** (specifically, the Wide Area Network entries in the Telecommunications Services and Internet Access Sections) posted in the Reference Area of this web site.

Revised 11/04/2001
http://www.sl.universalservice.org/reference/AOBFactSheet.asp

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Library Consortium Frequently Asked Questions
http://www.sl.universalservice.org/reference/library.asp

Q1. What is a library consortium?

According to the FCC's rules at 47 C.F.R. Section 54.500 (d), "A 'library consortium' is any local, statewide, regional, or interstate cooperative association of libraries that provides for the systematic and effective coordination of the resources of schools, public, academic, and special libraries and information centers, for improving services to the clientele of such libraries. For the purposes of these rules, references to library will also refer to library consortium."

Q2. Can a library consortium be an eligible entity for purposes of obtaining E-rate funding?

Yes. In order for it to meet the eligibility requirements, the library consortium (see **Q4** below for eligibility requirements) must either contain public areas that are accessible to library patrons and/or meet the administrative offices and buildings guidelines. (See **Administrative Offices and Buildings Fact Sheet** in the Reference Area of this web site.) A regional system fits the definition of a library consortium.

Q3. What if my library consortium has members which are both E-rate eligible and non-E-rate eligible?

Only the services for the E-rate eligible consortium members or those services provided by the consortium directly to the public qualify for discounts. Cost allocations must be done to assure that the consortium's Form 471 application requests discounts only for the E-

rate eligible entities.

Q4. What eligibility requirements must a library consortium meet in order to qualify for E-rate funding?

*   The library consortium must be eligible for assistance from a State library administrative agency under the Library Services and Technology Act (Public Law 104-208).
*   The library consortium's budget must be completely separate from the budget of any school (including, but not limited to, elementary and secondary schools, colleges and universities).
*   The library consortium must not be operating as a for-profit business.

Q5. My library consortium is not eligible for assistance from a State library administrative agency under the Library Services and Technology Act. Is there any other situation under which my library consortium might be eligible for E-rate?

You may consider whether the consortium may qualify as a consortium of eligible entities. In this situation, the services used by the consortium itself are not eligible for discounts, but the eligible services used by the eligible members of the consortium may qualify for discounts. You would treat the consortium as one having both eligible and ineligible members, and do cost allocations and apply for funding only for the eligible members' services.

In this case, the library consortium would check application type "Consortium" in Block 1, Item 5 of the Form 471, and complete Worksheet C along with any necessary preparatory Worksheets B.

Q6. How should a library consortium compute its discount level?

Situation #1. For services procured by and used by the library consortium at its own site or location, the library consortium shall use the discount level applicable to the school district in which the library consortium is located. In this situation, the library consortium would

check application type "Library" in Block 1, Item 5 of the Form 471, and complete Worksheet B. Also note that the eligibility rules for administrative offices and buildings must be observed. Please refer to the **Administrative Offices and Buildings Fact Sheet** in the Reference Area of this web site.

Situation #2. For services procured on behalf of all of the eligible member libraries that are part of the consortium, each consortium member must use the discount calculation that applies to their entity (either outlet/branch or system), sum the consortium member discounts, and divide by the the total number of consortium members. In this situation, the library consortium would check application type "Consortium" in Block 1, Item 5 of the Form 471, and complete Worksheet C along with any necessary preparatory Worksheets B.

Revised 11/05/01

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